Charlton Baker

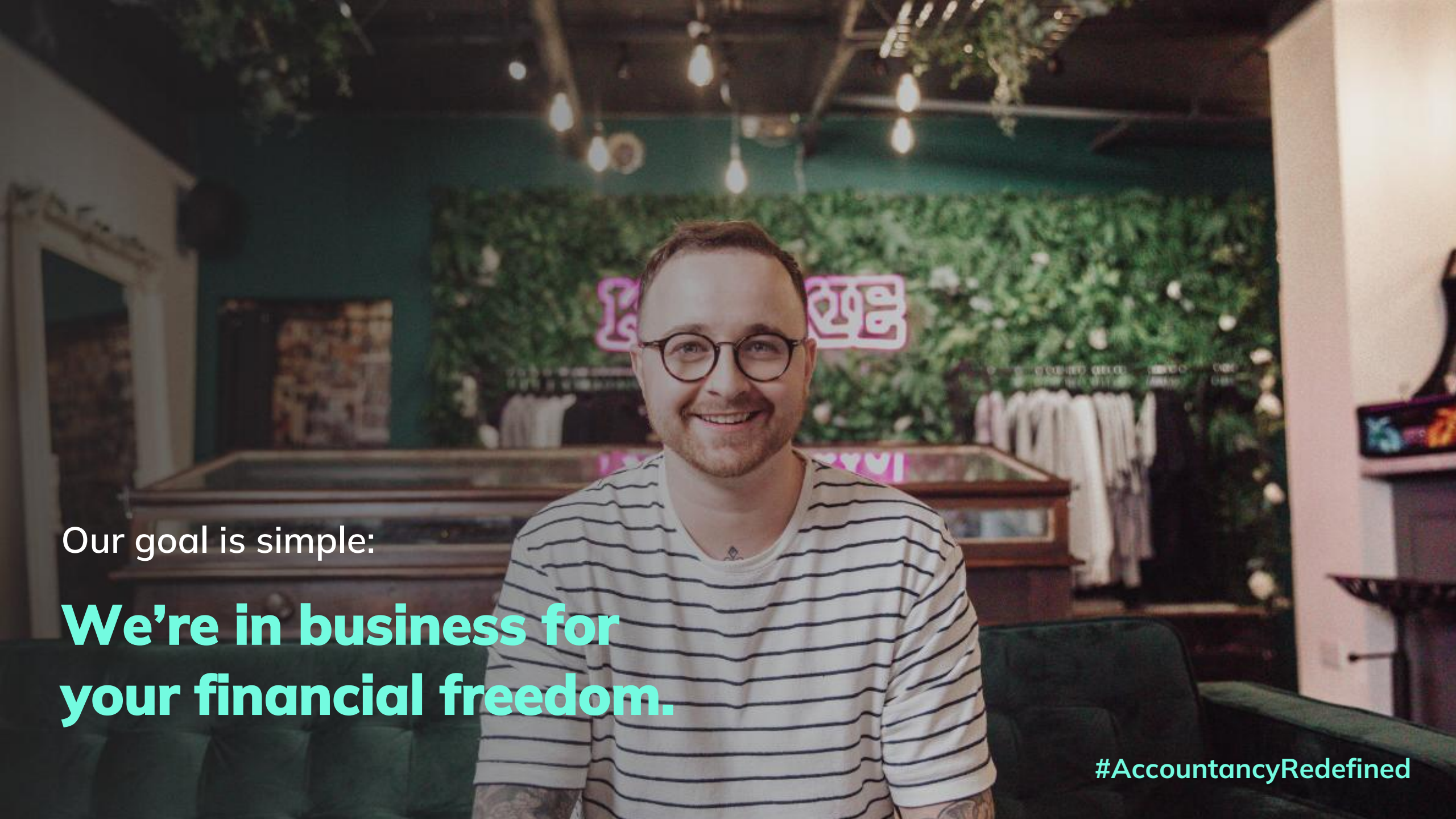
Client Service Charter

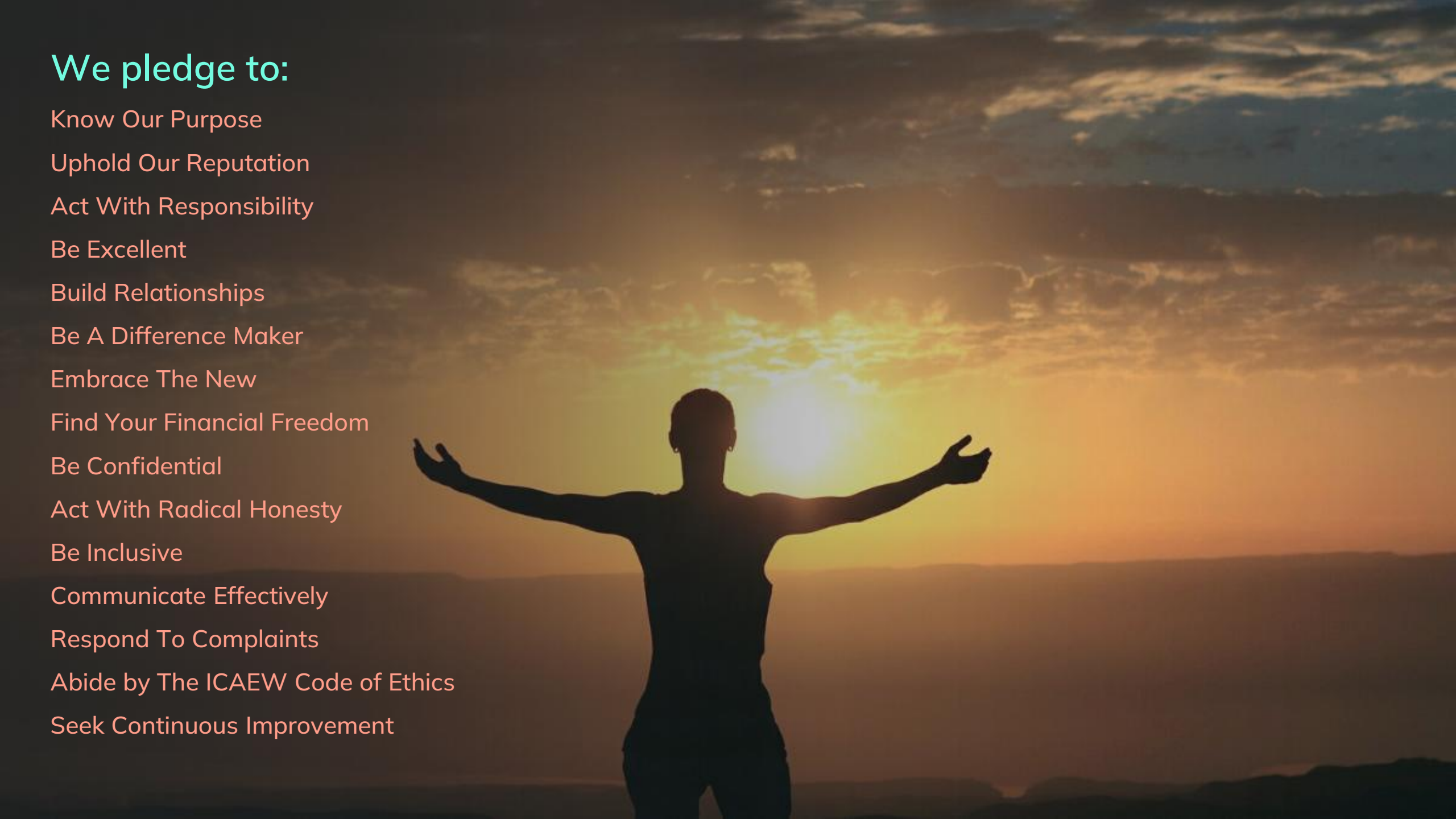
# Our Promise To You

Nov 2026

# Introduction

Our Promise To You has a clear and important purpose. Quite simply, it outlines our principles we pledge to uphold when serving you, our clients.


Our goal is simple:
We’re in business for your financial freedom.
#AccountancyRedefined



# We pledge to:

Know Our Purpose

Uphold Our Reputation

Act With Responsibility

Be Excellent

Build Relationships

Be A Difference Maker

Embrace The New

Find Your Financial Freedom

Be Confidential

Act With Radical Honesty

Be Inclusive

Communicate Effectively

Respond To Complaints

Abide by The ICAEW Code of Ethics

Seek Continuous Improvement

## Know Our Purpose

We provide exceptional service, delivering high-quality, responsive and professional services to meet your needs.

Our commitment to excellence is reflected throughout and knowing our purpose is essential for our team to be excellent teammates, with aligned and well-understood goals.

Our valued core behaviours will guide Team CB along the way and will be used in our everyday working life.

## Uphold Our Reputation

We conduct ourselves with the utmost professionalism, integrity and ethics in all interactions with our clients.

We have a “can do” attitude, delivering a service that is second to none, always acting in the best interests with honesty, transparency and integrity. We will always deliver a service that maximises who we are, not our bottom line.

## Act With Responsibility

Responsibility means acting with humility, staying grounded and taking ownership of what needs to be done, with no task being too big or too small.

We do this by going the extra mile and deliver what's needed to provide the best service. We hold ourselves accountable for the quality and outcomes we deliver. We will always act with precision and accuracy in all our work, ensuring that you receive reliable and trustworthy financial information and advice, always driving to achieve great things.

## Be Excellent

We recognise the importance of timeliness and efficiency in our service delivery. Through rigorous quality assurance procedures, we will complete tasks accurately and promptly, ensuring you receive timely insights and support to drive your business forward.

We will acknowledge all client enquiries within the working day that they were received and provide a more detailed response within 24 hours and a substantive response within the agreed timescales with you.

Where you have provided us with full and complete information in a timely manner, we will always ensure mandatory deadlines are never missed.

# Build Relationships

Our relationships with you are so important. We will always listen carefully and provide what is needed, and knowing your goals will help us identify solutions that may otherwise be missed.

We pledge to use clear and transparent language, and keep you informed about the progress of your engagements every step of the way, providing updates, insights, impact risks and guidance to help you make informed decisions.

We will always be polite and respectful.



## Be A Difference Maker

Working together as a team and sharing our vast amount of knowledge means we ensure that you receive the best possible service.

Curiousness and collaboration are integral to our approach, enabling us to leverage the expertise of our team members to enable you to accomplish your goals and enhance your lives.

## Embrace The New

We value having highly talented and driven team members who are hungry to be the best version of themselves. We are committed to continuous learning and professional development.

By staying abreast of the latest industry trends, regulations and best practices, we will ensure you benefit from the most up-to-date advice and expertise.



# Financial Freedom

**We aspire to help our clients find financial freedom.**

We understand that every client is unique, and we are committed to being flexible and adapting our approach to meet your specific needs.

By working closely with you, we will tailor our services to suit your requirements and provide customised solutions that align to your business goals and objectives and contributing to your success, whether it’s for a one-time consultation or ongoing support.

## Confidentiality

We will prioritise the confidentiality and security of sensitive financial information, so your data is always handled with the utmost care and confidentiality.

## Radical Honesty

With empathy and understanding, we will navigate, with honesty, the complexities of your affairs, ensuring the process is as smooth and stress-free as possible, creating a strong sense of caring.





# Accessibility and Diversity

We will always ensure clients with special needs or disabilities have equal access to our services and will do whatever necessary to meet their specific circumstances.

As a business that supports diversity and inclusion, we respect individuals from all cultures and ethnicities, walks-of-life, and preferences, without judgement or discrimination.

# Our Commitment To A Safe And Respectful Workplace

At Charlton Baker, we believe everyone deserves to be treated with dignity and respect.

We're committed to providing a safe, welcoming and inclusive environment for our colleagues, clients and everyone we work with. We have a zero-tolerance approach to sexual harassment, bullying, discrimination and other inappropriate behaviour.

We expect everyone who interacts with our team, including clients, suppliers, contractors and visitors, to treat others with courtesy and respect, whether in person, over the phone or online.

If someone's behaviour falls short of these expectations, we will take appropriate action. This may include ending a meeting, restricting contact or reconsidering a working relationship.

We take our responsibility to protect our people seriously, and we ask everyone we work with to help us maintain a workplace where people feel safe, valued and respected.






## Communication Channels

We know our clients prefer to receive communications when they are also fully engaged and working. For this reason, all our client communications take place during core working hours.

We'll never bombard you with emails or phone calls, and all of our communications will be concise, using simple language and terminology.



# Complaints Handling Process

We take all complaints very seriously, and pledge to respond to all complaints whilst acting with integrity, professionalism and speed.

If you have a complaint, please let us know at the earliest opportunity.

# If we receive a complaint, we will:

- Acknowledge receipt of a complaint within 48 hours and advise that the timeframe for resolution will be within 10 working days
- Raise the compliant with a company Director
- Collect all relevant details about the complaint, including the client's contact information, the nature of the issue, any relevant details, and any supporting documentation
- Investigate the complaint thoroughly
- Once the investigation is complete, take appropriate action to resolve the complaint
- We will keep the client informed throughout the process, providing updates on the status of their complaint and any actions taken.



# ICAEW Code of Ethics

We will adhere to these principles as they are crucial for upholding the reputation and integrity of the accounting profession and maintaining public trust:

- Integrity
- Objectivity
- Professional competence and due care
- Confidentiality
- Professional behaviour

For further details, please use the link below:

https://www.icaew.com/-/media/corporate/files/members/regulations-standards-and-guidance/ethics/icaew-code-of-ethics-2020.ashx?la=en

# Continuous Improvement

We are committed to continually improving the client experience in our service delivery and we encourage you to feedback so we can better understand how to meet your needs.

We are committed to finding other methods of continuous feedback from our clients and will share areas we have identified as requiring improvement in a timely manner.




We are proud to uphold these principles and
deliver exceptional service to our clients.



Charlton
Baker